# SmartOrder inventory solution guide

The SmartOrder* inventory solution in Cornerstone* Software creates a more efficient inventory workflow with real-time online inventory ordering. Orders placed within the Cornerstone Software receive real-time inventory status and pricing updates from integrated vendors (MWI, Patterson, and IDEXX). Order tracking is provided once an order is processed and as orders are shipped.

This guide explains how to implement the SmartOrder inventory solution at your practice.

## Prerequisites

- You'll need a consistent, high-speed Internet connection.
- The inventory feature must be set up in your Cornerstone software. You should be familiar with the feature and know how to run inventory reports.

  **Note**: If you haven't used the inventory feature, we recommend the Cornerstone Coach: Initiating Inventory Management course. For more information, click the link or call your IDEXX Cornerstone Sales Representative at **1-800-283-8386**.
- To save time on your initial orders, set up all inventory items for each vendor you plan to use before activating SmartOrder inventory solution.
- Complete the SmartOrder activation process for each vendor you plan to use by entering your account information in Cornerstone and agreeing to the terms and conditions of use. For instructions, watch IDEXX SmartOrder—Activate the Integrated Inventory Feature.

## Setting up the SmartOrder inventory solution

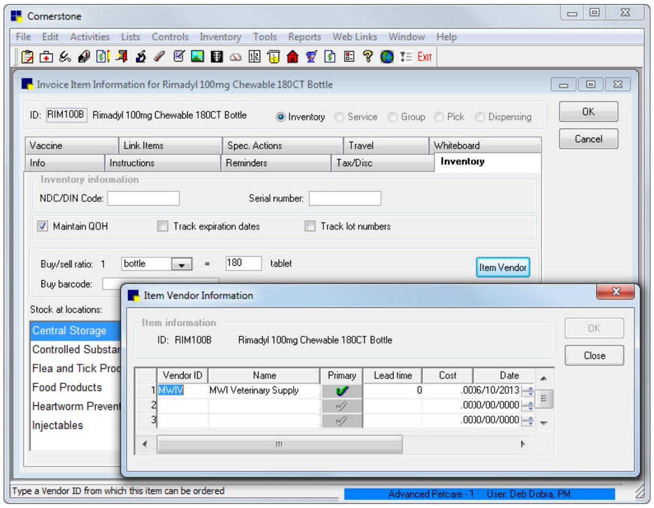
### Assign vendor information to items before you activate the SmartOrder inventory solution and before ordering.

To use SmartOrder, you must assign vendor ID numbers to Cornerstone inventory items. The most efficient way is to assign all the inventory items you order frequently from integrated vendors. **IMPORTANT**: For quantity-on-hand tracking items, the item buy/sell ratio must match the vendor's buy/sell ratio; for non-tracked items, the unit of measure (UOM) must match the vendor's buy UOM.

1. Create a list of the inventory items you use most frequently.
2. On the menu bar, select **Lists > Invoice Item**.
3. To limit the list to inventory items, select **Inventory items** and clear all other check boxes in the **Include** area.

   OR

   To search for a specific item, select **Description or Item ID** in the **Search by** area, and fill in the corresponding box in the **Invoice item information** area.
4. For each item that you want to assign:
   a. Select the invoice item and click **Update**.
   b. On the **Inventory** tab, click **Item Vendor**.




Click the image to view a snippet online demonstration of how to assign items to vendor information before you order.

c. Fill in the **Vendor ID** box. If you don't know the ID, press **F2** or double-click to select from a list.

**Note:** Verify that the **Primary** field for this item line has a green check mark, and click the field if it isn't already checked. This vendor will be the default when you add this item to the Purchasing Work List.

d. Scroll horizontally to access the **Vendor item ID** field, and enter the vendor's SKU number for the item.

e. Repeat steps c–d for any additional vendors.

f. Click **OK** to close the Item Vendor Information window.

g. In the Invoice Item Information window, on the **Inventory** tab, make sure that the buy/sell ratio is appropriate for the buy unit of measure supplied by the vendor.

h. Click **OK** to close the Invoice Item Information window.

5. Repeat step 4 until you've assigned all the invoice items on your list, and then click **Close** in the Invoice Item List window.

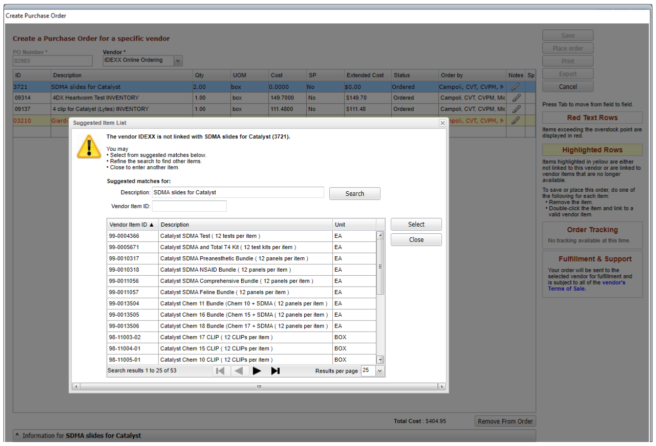
### Assign vendor information to an item—while ordering

We recommend that you set up most of your invoice items before you order, but you can also assign additional items while ordering.

When you create a purchase order, if an invoice item is not assigned to a vendor item ID in the Cornerstone software, that line is highlighted with a yellow background, and an alert message appears. Use the following process to add a vendor Item ID from the Create Purchase Order window or the Purchase Order View window.

1. Double-click the item's description. The Suggested Item List dialog box opens. The items that most closely match the description for the Cornerstone invoice item are highest in the list.
2. If the list is too large or you are unable to locate the appropriate item, edit the **Description** field to make it more precise, and click **Search** again.

   **Tip:** Including a specific measurement, such as 30 tests, can help to narrow your search results.
3. Select the appropriate vendor item ID for the Cornerstone invoice item.
4. Click **OK** to close the Suggested Item List box.



Click the image to view a snippet online demonstration of how to assign an item to vendor information while ordering.

The vendor item ID is applied to the Cornerstone item. This item will now be available for online ordering in the future.

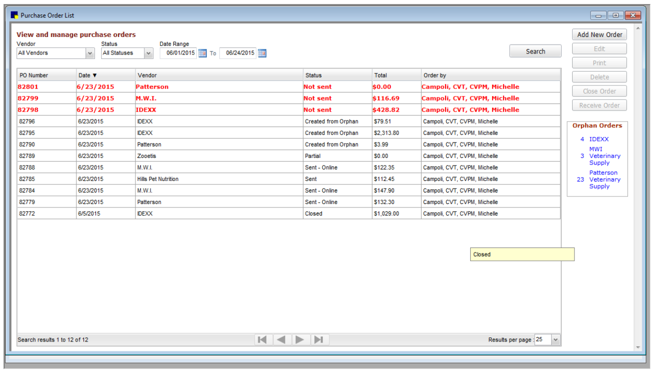
## Using the SmartOrder inventory solution

### Workflow overview

1. Create a purchase order from either the Purchasing Work List or Purchase Order List windows.
2. Place your order.
3. Track the status of the order on the Purchase Order List window.
4. When the order arrives:

   a. Open the purchase order in Cornerstone and receive it.

   **Note:** If the order was placed outside of Cornerstone, Cornerstone tracks it as an external (orphan) order. We recommend reconciling external orders so that you can use them within the SmartOrder workflow. (See the next section for details.)
5. Review the order for completeness, and update statuses on the purchase order accordingly.
6. Post the receipt.



Click the image to view a snippet online demonstration of the IDEXX SmartOrder workflow.

### Reconciling orders you place outside of Cornerstone (orphan orders)

You can track orders you place with the vendor without using Cornerstone. This kind of external order is listed in the Cornerstone software as a purchase order. We recommend that you reconcile the external order because this creates a Cornerstone purchase order that you can receive against and post.

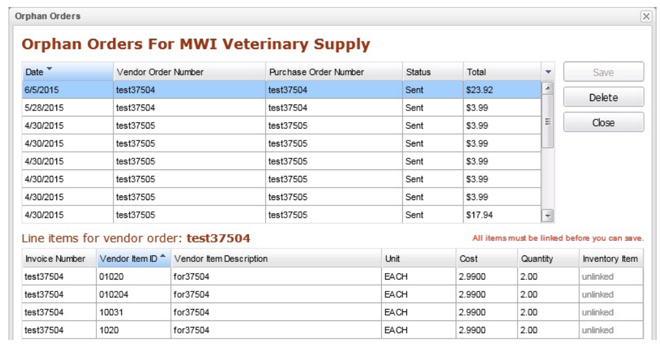
1. In the Purchase Order List window, click the **specific vendor** link (under Orphan Orders on the right), to open the Orphan Orders window.
2. Select an order in the top grid. The invoice items on that order appear in the search results table.

   All invoice items that are **unlinked** in the Inventory Item field must be assigned to Cornerstone inventory item IDs for the order to be reconciled and created. If all items are assigned, go to step 6.
3. For each unlinked item, double-click the inventory item line in the **Line items for** table.
4. If you know the item ID, type it in the **Inventory Item** box.

   OR

   If you don't know the item ID, double-click the **Inventory Item** field, enter a description in the **Description** box, select an item from the possible matches, and then click **Select**.
5. In the Orphan Orders window, press **TAB** to save the ID in the **Inventory Item** field.
6. When you have assigned all line items to Cornerstone inventory items, click **Save**. A message states that the purchase order has been created and lists the purchase order number.
7. Click **OK**. The purchase order appears in the Purchase Order List window.

   You can receive against this order and then post it, just as with any other purchase order.




Click the image to view a snippet online demonstration of how to reconcile orders.

## For more information

- For detailed information about electronic inventory ordering, see the **Inventory > Electronic Inventory Ordering** section of the Cornerstone Help.
- To access the snippet online demonstrations directly and to access additional snippets about inventory, go to idexxlearningcenter.com and search for Cornerstone inventory.